



SMOObU

Insights 2026

How Hosts Will Win:
Quality, Value and
Professionalization

SMOObU

The Time To Professionalize Is Now



Jannik Abraham

Managing Director
Smoobu



As with every year in our industry, change is constant. But one thing remains: In 2025, despite global uncertainty, people still prioritized travel.

The short-term rental industry continues to display incredible resilience and opportunity. And where there is opportunity, there will be competition. I believe competition is simply "proof of concept"; it confirms that there is demand to be captured. It's an exciting time to be a host!

It's also exciting to see independent hosts leading the way in guest satisfaction. We built Smoobu with you in mind: to simplify your day-to-day and empower you to run a professional business on your own terms. Because success in 2026 and beyond belongs to those who professionalize: shifting from casual hosting to running their rental like a business with the right support.

In this report, we've combined data from our top-performing 500 hosts and over 200,000 bookings with industry insights, so you can see what's changing, what it means for you, and how to adapt. Whether you're focused on improving quality, simplifying operations, or increasing revenue, this report offers practical strategies you can immediately implement. Think of it as your toolkit for intentional growth.*

*To your success,
Jannik Abraham*

*For further information, go to slide 40.

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An aerial photograph of a winding asphalt road that curves through a dense, lush green forest. The road is dark grey with white lane markings. A small blue car is visible on the road, positioned near the bottom center of the frame. The forest is composed of many small, rounded trees, creating a textured, green canopy. The lighting is bright, suggesting a sunny day, with some shadows cast by the trees.

01

What 2025 Taught Us

Key trends and market shifts

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We learned that...

The Appetite For Travel Is Resilient

Despite the economic challenges of 2025, travel demand remained strong, with Europe seeing continued demand for short-term rentals.

 **The data says:** Guest nights booked through major platforms like Airbnb, Booking.com, and Expedia increased by 17.8% in Q2 and 8.7% in Q3 compared to the previous year*, proof of market resilience.

What this means: Guests remained committed to travel but became more price-sensitive, leading to a rise in last-minute bookings and a preference for flexible stays. Cost awareness and perceived value now play a larger role in decision-making than before.

Hosts who adjusted their strategies by offering flexible pricing and last-minute discounts capitalized on this trend, achieving higher occupancy and improved booking rates.

*Based on [Eurostat data on short-stay accommodation guest nights](#).





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We learned that...

Guest Behaviour Skews Last Minute, Shifting Seasonality

In 2025, guest booking behavior shifted significantly, with travelers increasingly booking last-minute and opting for off-peak months to avoid crowds, save money, and escape extreme weather conditions.

 The data says:*

- 41.7% of bookings now occur 7 days or less before travelling.
- The average length of stay platform-wide remains stable at 3.5 nights, with short stays continuing to dominate.
- Long-lead bookings (31+ days) decreased from 36.8% to 33.5%.
- Seasonal distribution is evolving: while the year-end (Oct - Dec) share dipped by 4.1%, the Jan - Mar period saw a 2.5% uplift, showcasing the traditional low season as a period of growing interest.

What this means: Hosts who optimized their listings for the off-season, using accurate seasonal imagery and tailored descriptions, were the ones to benefit from this shifting and unpredictable seasonality.

*Based on Smoobu Internal Data.

2025 Data: Last Minute Bookings on the Rise & Shifting Seasonality

Last minute bookings
≤7 days lead time

41.7%

Up from 35.8% in 2024.

Average length
of stay

3.5 nights

Stable from 2024

Jan - Mar
Share of yearly bookings

+2.5%

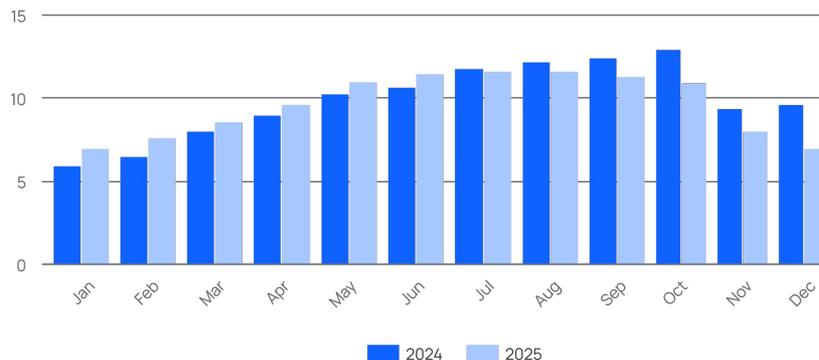
Compared to 2024

Oct - Dec
Share of yearly bookings

-4.1%

Compared to 2024

Seasonality Shift:
% of Annual Bookings by Month



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We learned that...

Independent Hosts Outperform Large Operators

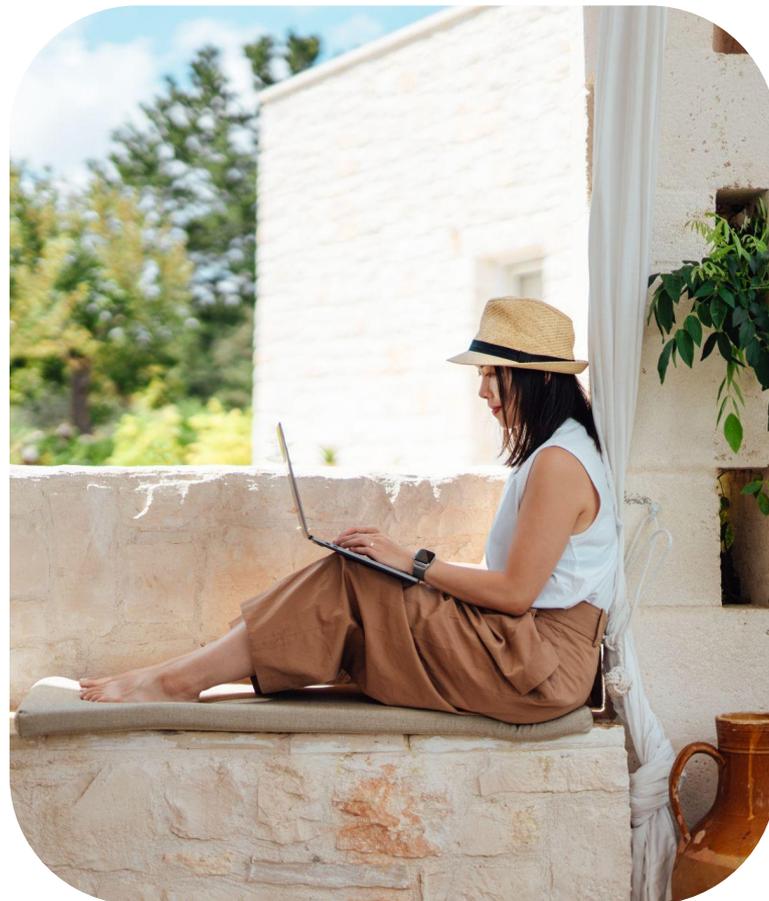
Smaller hosts continue to dominate the top performance categories by offering personalized service and adapting quickly.

 The data says:

- On Airbnb, smaller hosts averaged 4.81 ⭐, compared to 4.64 ⭐ for large property managers*.
- Airbnb Badge Data showed that 55% of single-unit hosts earned Guest Favorite badges, while only 23% of large operators did*.
- Smoobu Internal Data showed that the top 500 hosts on Smoobu manage a median of 2 rentable units (average: 3.8, ranging from 1 to 159 units).

What this means: Independent hosts have a flexibility advantage, allowing them to offer a personal touch and deep local expertise that guests travelling for experience value most right now. While larger hosts navigate scaling, smaller hosts are winning on connection.

*Data from VRWS 2025, ROME





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We learned that...

Listings That Adapt, Win More

In a competitive market, success isn't just about having a great property; it's about having a great strategy. The difference between a booked calendar and an empty one comes down to how quickly you can adapt.

- **Dynamic Pricing:** Static rates are a thing of the past. Hosts who used flexible and bridge pricing didn't just wait for guests; they automatically secured bookings by staying competitive 24/7. [Learn more about Smoobu Dynamic Pricing here.](#)
- **The "Bleisure" Upgrade:** Work and play have merged. By adding simple amenities like a dedicated workspace, hosts can unlock a new demographic of "work-from-anywhere" travelers who stay longer and spend more.
- **Automation as a Superpower:** The top performers didn't work more hours; they worked more efficiently. How? Some examples are leveraging a [Channel Manager](#) (goodbye, double bookings) or [automating guest messages](#) (because, why not).



02

2026 Outlook

Travel & hosting in a changing world

1. Experience Over Everything (Still)

Travel decisions continue to be driven by meaning, identity, values, and personal fulfillment.

While location and price remain fundamental, they are no longer the sole deciding factors; instead, they act as the baseline for broader considerations.

Elements such as authenticity, local culture, nature, and self-expression are shaping booking decisions more than ever before.

In 2026, guests are also booking an identity. From nature-based escapes to curated local flavors or partnerships, the most successful hosts are moving beyond accommodation and into experience design.



41% of travelers want deeper cultural immersion and interaction with locals. ([Oxford Economics TTS](#))



48% of travelers show increased interest in nature-based experiences. ([Oxford Economics TTS](#))



50% of travelers are more interested in trying local food and drink than two years ago. ([Oxford Economics TTS](#))



70% of travelers say experiences, not destination or price alone, are their primary travel motivator. ([EU Travel Tech](#))



“I deserve it” travel, celebrating milestones, self-care, wellness and personal achievements is a growing booking trigger. ([Booking.com Travel Predictions 2026](#))



Gen Z and Millennials now represent over **half of global travel demand**, prioritizing values, flexibility, and identity-driven travel. ([EU Travel Tech](#))



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2. The Value-Conscious Traveler

Travelers are prioritizing experiences, but they are doing so with greater financial precision.

Rising living costs and economic uncertainty have made guests more selective. Many are actively comparing destinations, accommodations, and costs before booking. Affordable destinations are gaining attention, and domestic travel continues to hold a strong share of overall demand.

Importantly, this shift is not a signal for hosts to begin a “race to the bottom” on pricing. Guests remain willing to pay for premium options, provided the value is obvious, differentiated, and aligned with their expectations.

In 2026, guests are not simply looking for the lowest price, they are looking for the clearest value. It’s important for hosts to understand the difference.

3. AI & Personalisation at Scale

Travel planning is becoming increasingly digital, mobile-first, and AI-assisted. Guests expect faster discovery, more relevant results, and highly personalised recommendations, from inspiration to booking. Technology is shaping how travelers search, compare, and decide.

In 2026, it is vital for hosts to show up effectively by optimizing their digital presence for high-speed mobile bookings and by providing descriptions that translate their unique hospitality into searchable recommendations.



56% of all travelers and 76% of younger travelers want to use more travel services on mobile devices for greater independence and personalisation. ([Oxford Economics TTS](#))



Nearly 60% of travelers are open to increased digital personalisation in their travel journey. ([Oxford Economics TTS](#))



AI-powered tools are expected to influence the majority of travel planning journeys in 2026. ([EU Travel Tech](#))



50% of travelers intend to use AI tools when planning their trips. ([Booking.com](#)) At the same time, **25% report receiving outdated or inaccurate AI information**, highlighting the importance of reliable and structured content. ([Amadeus](#))



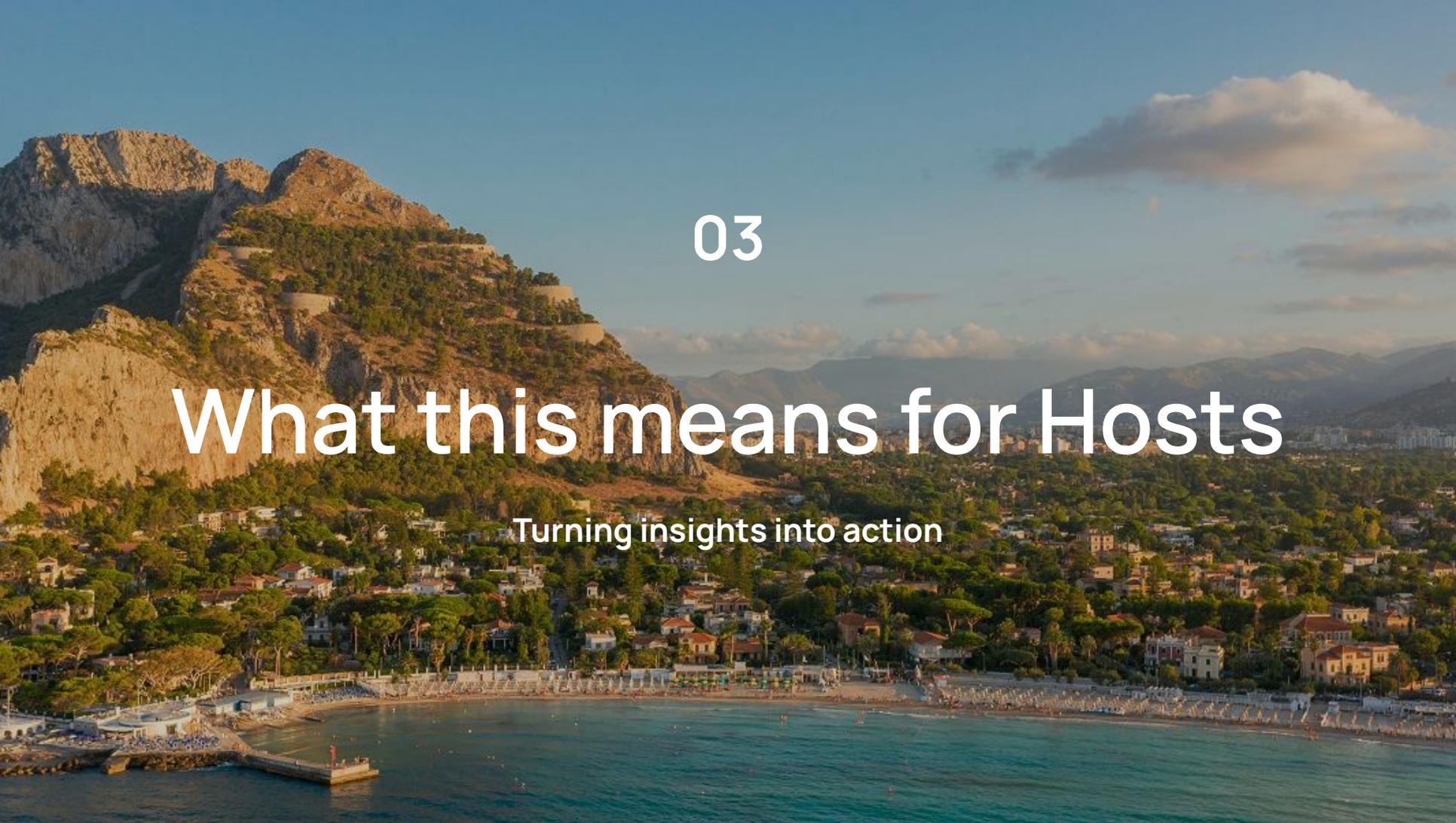
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4. Seasonality Is Being Rewritten

The traditional travel calendar is evolving. What was once a predictable cycle of high and low seasons is becoming more fluid, driven by a permanent shift in how we live and work.

- Hybrid work has turned "Bleisure" and extended stays into structural staples.
- More than 40% of travelers actively seek alternatives to overcrowded destinations*, accelerating interest in secondary cities, rural areas, and shoulder seasons.
- This is further influenced by guests adapting to climate patterns, such as avoiding peak-summer heatwaves.

In 2026, we are seeing a more distributed demand that is less tied to school holidays and more shaped by lifestyle and flexibility.

An aerial photograph of a coastal town built on a hillside, with a large, rugged mountain in the background. The town features numerous buildings with red-tiled roofs and lush greenery. The sea is visible in the foreground, with a small pier extending into the water. The sky is clear with some light clouds.

03

What this means for Hosts

Turning insights into action

1. Professionalization Is No Longer Optional

Across Europe, governments are introducing stricter regulatory frameworks to address housing pressure and improve transparency. Broader EU-level regulation is expected by the end of 2026, giving cities clearer tools to manage short-term rentals. On a host level, this means that national and local requirements for reporting, taxation, and documentation are increasing the administrative burden.

Despite these pressures, the market continues to expand. Europe now counts over 4 million active short-term rental listings*, intensifying competition while average daily rates show signs of softening. In this high-stakes environment where hosts must navigate complex compliance while competing for visibility, the 'casual host' model is becoming a significant business risk.

Note ! Professionalization is not about the size of your portfolio; it is about the standard of your operations. It means adopting the structure, compliance, and clarity required to thrive in a regulated market.

As EU regulations shift from predicted to mandatory, only hosts who maintain strict discipline and operational oversight will thrive. Success in this competitive landscape now requires a thorough and consistent approach to documentation and regulatory compliance.

*Based on AirDNA's [European Review September 2025](#).



Learn about Smoobu Dynamic Pricing

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2. Revenue Discipline in a Value-Driven Market

In a market where guests compare more options and evaluate price against perceived value, success in 2026 will depend on pricing smarter.

 The data says:

- 50% of travelers prefer more affordable destinations, with cost being the top deterrent to booking. ([Oxford Economics TTS](#))
- Guests browse an average of 19 listings before confirming a direct short-term rental booking. (Source: [Getdirecto](#))
- Average daily rates and RevPAR have shown slight declines year-on-year, reflecting stronger price sensitivity. ([AirDNA](#))

In 2026, success belongs to hosts who replace static pricing with a flexible, value-driven strategy. Hosts should be asking themselves what their property differentiator is, how they're communicating it effectively, and how they're leveraging dynamic pricing tools to capture demand.

3. Quality Is the Real Differentiator

As travel continues to be more experience-driven, consistency and quality are decisive. Guests expect reliability, clear communication, and stays that reflect the experience they were promised. Quality is the way to turn visibility into bookings and bookings into repeat guests.

The data says:

- 50% show increased interest in local food and authentic cultural experiences. ([Oxford Economics TTS](#))
- On Airbnb, small hosts are averaging higher star ratings versus larger property managers. (VRWS 2025, ROME)
- Single-unit listings are earning more Airbnb Guest Favorite badges versus large operators. (VRWS 2025, ROME)

Smaller hosts outperform because they combine personal attention with clear expectations. In 2026, maintaining quality at scale, through structure, consistency, and personalization, will separate strong performers from the rest.





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4. Visibility Is Algorithmic

Visibility is no longer about just being listed; it's about being discoverable. And with increasing competition everywhere, discoverability has become a competitive layer of its own.

Travel planning is increasingly mobile-first and digitally mediated. Guests rely on smart filters, recommendation engines, and AI-powered search tools to narrow down options quickly. This means that structured content, complete amenity information, accurate pricing, and consistent availability directly influence whether a listing appears or disappears in search results.

Hosts are competing on clarity, digital presence and platform optimization. Structured information and operational precision will translate into visibility, and visibility into revenue.

[Download our Guide to Direct Bookings](#)

5. Control Over Distribution Is Strategic

Relying on a single platform increases exposure to algorithm shifts, policy changes, and fee structures. Diversification is your way to mitigate risk.

 The data says:

- 90% of hosts plan to invest the same or more in direct booking channels in the coming year. ([PriceLabs Global Host Report 2025](#))
- Looking at Smoobu's platform-wide data, in 2025 direct bookings grew by 12%*
- Among Smoobu top hosts, the share of bookings via direct websites grew from 3.2% to 3.5%*.

A balanced distribution strategy doesn't mean abandoning OTAs; it means using them as a discovery engine to build your own brand. Capture your first booking via OTAs and ensure no guest leaves without a clear path to your own direct booking site.

Use booking platforms for discovery



Attract new guests (and new bookings)



Global reach: Get the best of global and local visibility

Use Smoobu to own your brand



Manage bookings from all platforms in one place



Secure direct bookings from your own website

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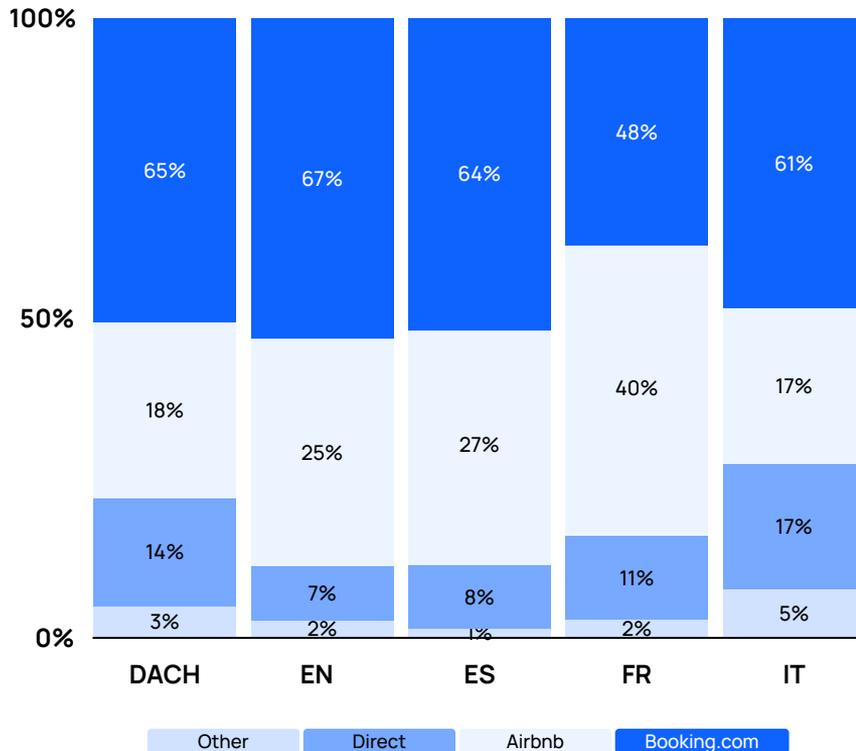
Where Do Top Hosts Get Their Bookings?



New markets, new learnings

Top-performing Smoobu hosts rely heavily on OTAs, but the balance between platforms varies by market.

There is no universal channel formula. Start by understanding your local market dynamics to build a resilient and diversified distribution strategy.



Smoobu Internal Data, OTA Share by Market (2025) - Top 500 Hosts

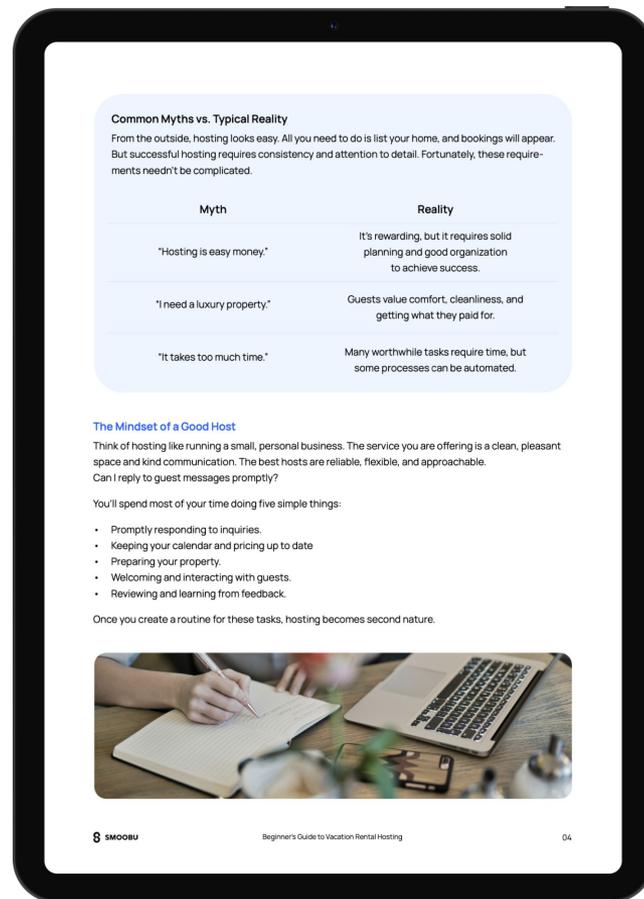
6. Operational Simplicity Protects Margins

Each priority outlined so far, professionalization, revenue discipline, quality differentiation, and distribution control, is a pillar of strategic value. However, without operational clarity, these pillars can become a source of complexity rather than growth.

High-performing hosts don't necessarily work harder; they work with more precision, focusing on the tasks that move the needle for their specific stage of growth.

The next section turns these strategic priorities into practical steps, tools, and tactics that you can implement to strengthen your performance in 2026. Let's go!

[Download The Beginner's Guide to Vacation Rental Hosting](#)



An aerial photograph of a lush green lawn. On the left, there is a building with a green corrugated metal roof and a grey concrete entrance. In the center-right, a person is sitting in a hammock strung between two trees. Another person is sitting on a chair nearby. The scene is surrounded by palm trees and other tropical vegetation.

03

Your 2026 Hosting Toolkit

Practical Strategies for the Professional Host

Making The Most Of 2026

At Smoobu, our goal is to make the art of being a host simple.

We see the challenges: tighter margins, rising regulation, shifting guest behavior, but we also see the opportunity.

It lies in how you're able to:



Win on OTAs

Leveraging promotions and platform tools to capture demand strategically.



Build Quality Systems That Scale

Turning guest experience into stronger reviews and repeat bookings.



Grow Direct Bookings & Brand Control

Reducing platform dependency while building long-term guest relationships.



Price Smart & Optimize Revenue

Aligning rates with demand, seasonality, and booking windows.



Simplify Compliance & E-Invoicing

Staying ahead of regulation without increasing administrative burden.

Targeted Promotions – Use early-bird, last-minute, or event-based discounts strategically to stimulate demand without permanently lowering your rate.

Member & Mobile Offers – Activate platform-specific discounts on offer to increase ranking visibility and capture high-intent guests. The first booking might not be the last!

Visibility Boost Features – Leverage temporary boosts and preferred program tools to improve discoverability during slower periods.

Flexible vs. Structured - Offer a higher price with free cancellation and a lower price with no cancellation. This keeps you competitive with different traveler types (price sensitive and risk averse) while making sure you still get paid.

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Winning on OTAs

OTAs are more than booking platforms; they are sophisticated demand engines. That's why visibility and strategic use of platform tools are paramount. It might just be the difference between occupancy and revenue performance.



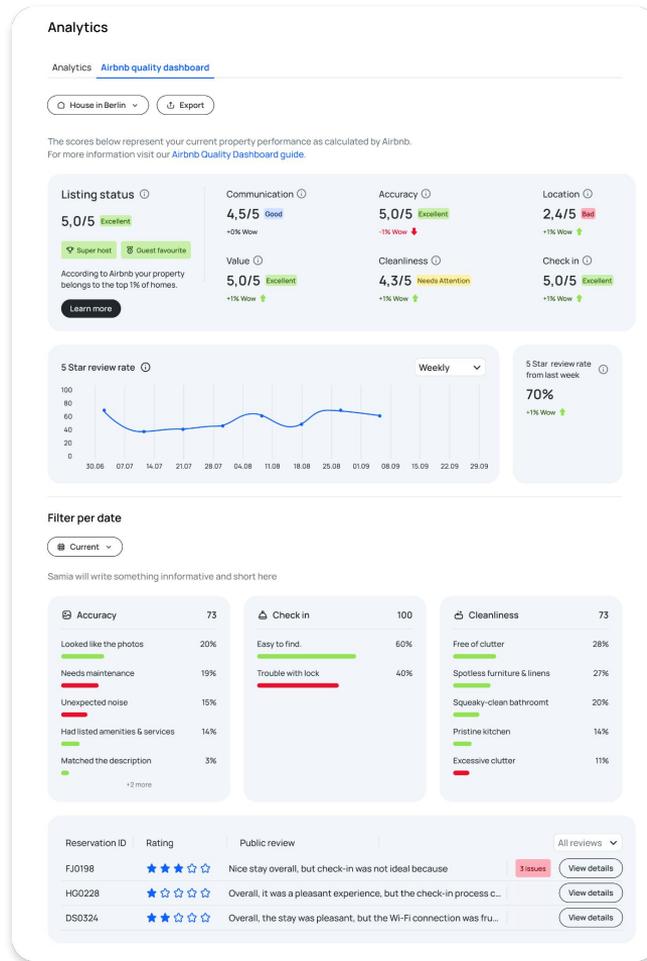
Quality Systems That Scale

In a year where quality is the ultimate differentiator, tapping into your suite of performance-tracking tools is your competitive edge. Understand the numbers and let them influence your business.

1. Smoobu's Airbnb Quality Dashboard – Monitor key performance indicators such as communication, cleanliness, and value to quickly identify improvement areas and maintain high standards.
2. Automated Communication – Set up pre-stay messages, check-in instructions, and post-stay follow-ups to ensure consistency, speed, and professionalism.
3. Digital Guest Guide – Centralise house rules, property information, and local recommendations to enhance the guest experience and reduce repetitive questions.
4. Professional Review Management – Respond to feedback in a structured and constructive way, turning even negative reviews into opportunities to build trust.

Tip: Review your guests too, and [automate it inside Smoobu!](#) This can increase your chances of receiving a review in return, crucial for Airbnb's algorithm.

*Find out more about the [Airbnb Quality Dashboard](#) in this article.



Direct Booking Website – Create a professional, commission-free booking channel that reflects your property and offers guests a seamless reservation experience.

Transparent Pricing & Exclusive Benefits – Present clear rate structures and direct-only advantages to encourage confident bookings.

Repeat Guest Strategy – Capture guest data and nurture long-term relationships through follow-ups, special offers, and loyalty incentives.

Strong Brand Image – Use high-quality visuals, consistent tone, and compelling descriptions to build trust and differentiate your property across all channels.

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Direct Booking & Brand Image

While OTAs remain powerful demand drivers, building your own direct booking channel increases independence, protects margins, and strengthens long-term guest relationships.



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Smart Pricing & Revenue Optimization

In 2026, pricing needs to be intentional. The most successful hosts will treat pricing as an active strategy, not a set-and-forget task:



Dynamic Pricing – Automatically adjust rates based on demand, seasonality, and occupancy to stay competitive without underpricing your listing.

Non-Refundable Rates* – Offer a discounted non-refundable option to secure committed guests, reduce cancellations, and stabilise income during peak or high-risk periods.

Bridge Pricing – Strategically fill one-night gaps between bookings by offering targeted discounts without lowering your overall rate structure.

Minimum Stay Adjustments – Adapt minimum stays to demand patterns to capture high-value bookings and increase flexibility when needed. For example, 5 nights for high season (holidays/summer) to capture high-value weekly stays.

*Find out more about [non-refundable rates](#) in this article.

Smoobu E-Invoicing Integration – Automatically generate and manage compliant invoices in markets where digital reporting is required (currently active in DE and IT, coming soon in ES).

Centralized Documentation – Keep all booking, guest, and financial data organised in one system to simplify audits and reporting.

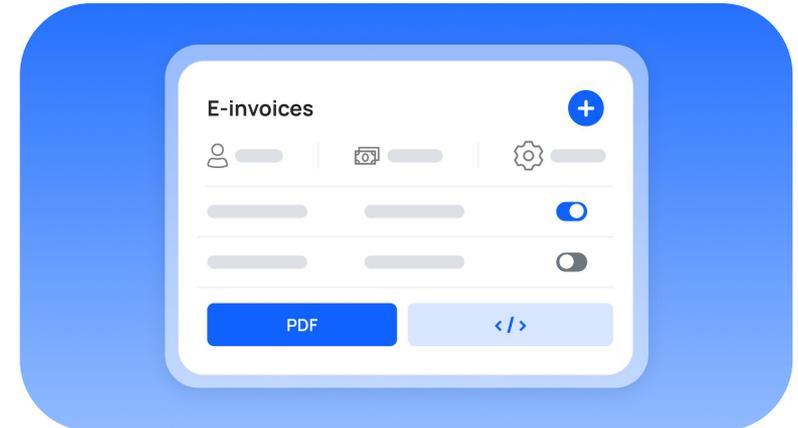
Get Support – Save time on admin by using our integrated solutions for guest registration and tourist taxes. Our partners [Trippz](#), [Chekin](#), [ChargeAutomation](#), and [Stellar](#) make staying compliant easier.

Regulation Readiness – Adapt quickly to local policy changes with structured processes already in place.

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Compliance & E-Invoicing, Simplified

As short-term rental regulations tighten across Europe, compliance is becoming part of everyday hosting. Reporting requirements, tax obligations, and local rules are increasing but they don't have to increase your workload.





04

Smoobu Host Stories

The people behind the stays

SMOOBU Host Story

ABAITA

A Journey Toward Home

Wandlitz, Germany

2 years of hosting experience

5/5 Google Review Rating

1 pet-friendly property

“With Smoobu, we run ABAITA like a brand, not just a listing. We look professional, but we don’t lose our personality in the process. Smoobu isn’t hotel software; it’s light, intuitive, and doesn’t get in the way of hosting. At the same time, it’s powerful enough to handle everything we need. That balance is rare.”

[Find full story here](#)



SMOOBU Host Story

Slaaphuisje Chutzpah

Daring to Host Differently

Borger, Netherlands

> 1 year of hosting experience

5/5 Google Review Rating

1 luxury property

“Smoobu lets us focus on the heart of hosting, creativity, and connection, not admin chaos. If you want to protect your creative process, as every artist and human should, find tools that free you from the rest.”

[Find full story here](#)



SMOOBU Host Story

Futurostudio

Dedicated to Guest Experience

Poitiers, France

Airbnb Guest Favorite

9.2/10 on Booking.com

5 Properties

“Why look for features you will never need? Smoobu is solid, clear, and reliable. Everything works perfectly. I have recommended Smoobu, I recommend it now, and I will keep recommending it.”

[Find full story here](#)



Share Your Smoobu Success Story! ★

We believe that representation is everything. Your journey as a host is unique, and we'd love to celebrate your success by featuring your story. Whether you've mastered automation or built a retreat, your experience could be the exact inspiration another host needs to take their next step.

Why participate?

A feature on our blog and social channels puts your rental in front of a global audience, and who knows? Your next guest might be among them.

Simply fill out the form below, or share your hosting moments on social media using #HowISmoobu (and don't forget to tag us).

[Share your story here](#)



05

Thank You

Simplifying hosting in 2026 and beyond

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Here's to Growing Together



Your Smoobu team

Behind every booking, every review, and every success story is a dedicated host. And behind every strong hosting business is a community that learns, adapts, and grows together.

We are incredibly grateful to support a network of hosts who continue to raise the bar in quality and professionalism. Your resilience and commitment are what make this industry stronger year after year.

As the market evolves, our mission remains the same: to provide the tools, insights, and support you need to thrive.

We look forward to continuing this journey with you, building smarter systems, stronger businesses, and a more connected hosting community in 2026 and beyond.

Here's to growing together.

The Smoobu Vacation Rental Software

Our main features



Channel Manager

Eliminate double bookings and synchronize your calendar automatically



PMS

Get an executive summary and manage all your vacation rentals from a central point



Website Builder

Reach more guests and showcase your brand and attract more guests



Booking Engine

Grow direct bookings and revenue and focus on attracting new guests and retaining loyal guests



Ready to simplify
your workload?

Try for free!

Learn more at
smoobu.com



The Smoobu Vacation Rental Software

Our main features



Guest Communication

Automate guest communication, personalize your messages and schedule delivery



Dynamic Pricing

Optimize pricing and occupancy with our dynamic pricing solution



Guest Guide

Enhance the guest experience and welcome everyone with a personalized Guest Guide



Statistics

Access all your booking data from connected platforms in one dashboard for easy monitoring.

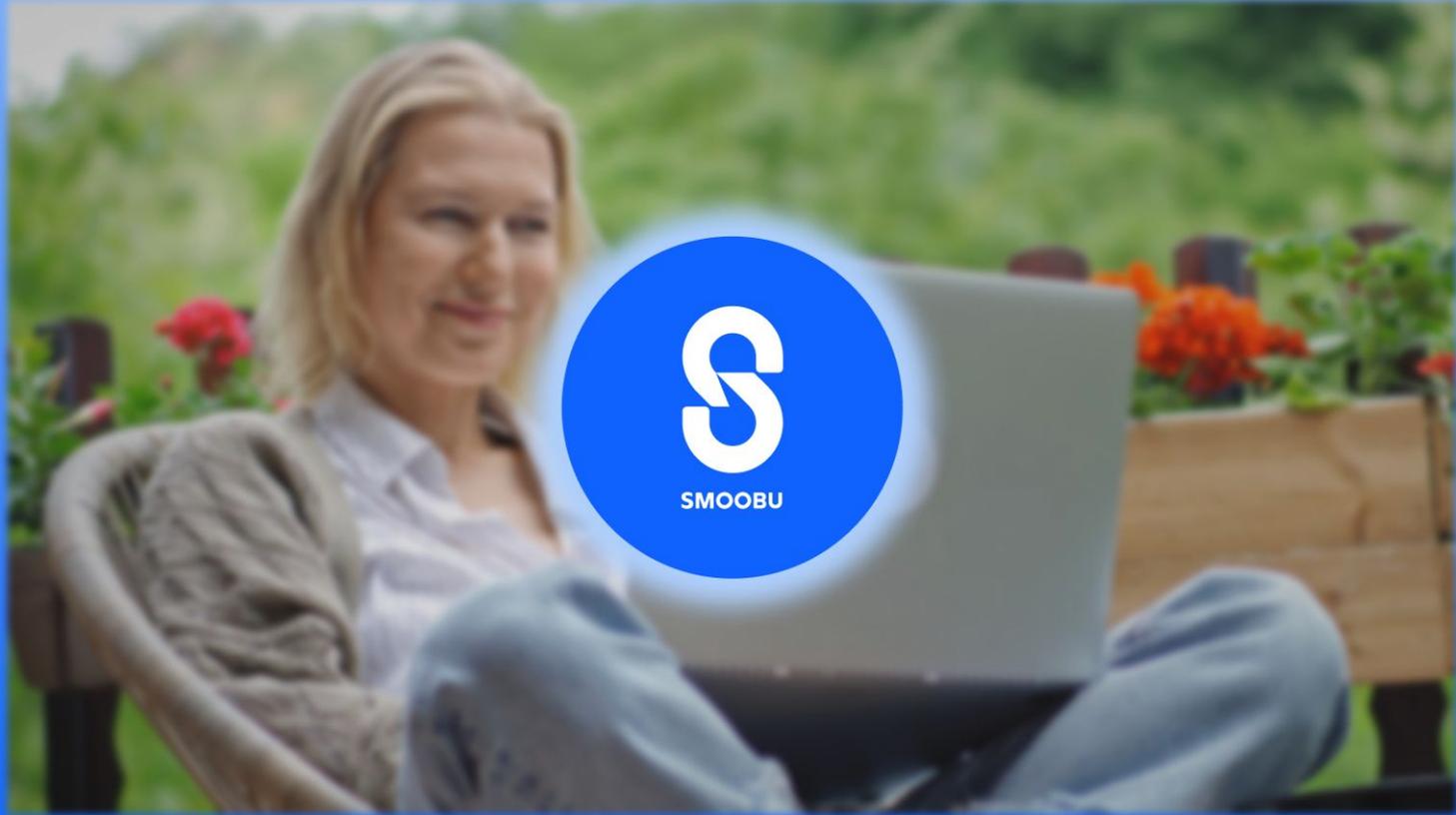
Ready to simplify
your workload?

Try for free!

Learn more at
smoobu.com



Click to See How Smoobu Simplifies Being a Host



Some Legal Requirements Before We Go

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*The information reported in Smoobu Insights 2026 was collected anonymously from a sample of 500 top-performing users. We define top performers as Smoobu hosts with the highest number of bookings per unit from January 1 to November 1, 2025. The number of bookings in the time period calculated does not reflect the length of bookings as per the number of days. Specifically, we analysed 100 short-term rental hosts in each core market, defined as per the following: UK (England, Northern Ireland, Scotland, Wales), DACH (Germany, Austria, and Switzerland), FR (France, Belgium), IT (Italy and Italian-speaking Switzerland), and ES (Spain). This report bases its statements, data, and insights on analyses of the top 500 Smoobu hosts across our core markets. Each user's right to privacy was respected in the process.

To learn more about the report, contact: info@smoobu.com

Trusted by the best in the industry

Booking.com

Premier Connectivity Partner 2025



Preferred
Software Partner
2025

expedia group
partner solutions

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